

**OCEANSIDE COMMUNITY ASSOCIATION  
2024-2025 STRATEGIC PLAN**

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### **2024-2025 STRATEGIC PLAN**

#### **MISSION STATEMENT**

The Association's primary general mission is to preserve and protect member home values while continuing to provide an affordable living experience for the benefit and health of all members. That mission is best realized through Plan guided unselfish collaboration among member volunteers, Association employees, and vendors. The benefits of all successes and costs of all losses due to failures or unforeseeable circumstances experienced by the Association are shared wins and losses for all members. Membership comes with both member rights and responsibilities. All members share equal rights and responsibilities for the success or failure of the Association.

#### **VALUES STATEMENT**

Accountability – The Oceana Board of Directors are accountable to the Best Judgment Rule (decisions based on sound business judgment) and legal requirements, by acting in good faith, on an informed basis, and in the honest belief that actions taken are in the best interest of all homeowners.

Service – The Board, volunteers, and management team serve the unique cultural, environmental, and economic needs of our residents and place the needs of our residents as a priority.

Transparency – The Board of Directors strives to follow competent advice and act in an honest and open approach, seeking input from the members of the association.

### **THE 2024 STRATEGIC PLANNING PROCESS**

The BOD conducted their annual Strategic Planning Workshop on May 9, 2024, held a resident Town Hall on June 9, 2024, and a follow-up to the 2024 Strategic Planning on June 11, 2024. During this workshop, the BOD completed an extensive review of the strengths, growth areas, residents' desires, and future of the community. The following are the conclusions based on the combined knowledge of our community.

### **WHAT DO OUR RESIDENTS WANT?**

Information from homeowners was collected for the BOD to consider in developing the Plan and was very useful. This included a Town Hall held on June 9, 2024, attended by 140 OCA members.

The purpose of the Town Hall was to gather feedback regarding the things that homeowners would like to see included on the strategic plan. The input ranged from settling the legal issues, to maintenance, landscaping, and security, to replacing the clubhouse door buzzer. Every recommendation, suggestion, and idea was valuable and has all been included in the strategic plan documents.

### **WHAT DOES THE BOD WANT?**

The Board of Directors wants to see Oceana back to the positive, harmonious place it once was. We are an aging community with problems to be resolved. These have become the focus of the Association. We are also very fortunate to have so many benefits accessible to us as residents of Oceana. The Board wants our focus on the positives to at least equal the time spent on problem solving.

The board would like:

1. To set the top four to five goals per year, with action items that are realistic and achievable
2. More resident and management feedback, to include possible solutions and problem solving.
3. A regular report from management to keep the board and community informed of management activities.
4. Resolution to the current legal issues we have.
5. The most efficient and effective process to respond to residents.
6. No more five (5) hour meetings!

## **HOA STRENGTHS**

The BOD discussed our knowledge and understanding of resident's comments, our own opinions, and experiences to identify the following strengths:

1. We have great natural resources.
2. This 2024/2025 Board of Directors.
3. People in the community care for each other.
4. There is an emphasis on volunteers.
5. The activities
6. The current maintenance staff and OCA office staff.

## **HOA WEAKNESSES**

The BOD discussed our knowledge and understanding of resident comments, our own opinions, and experiences to identify our weaknesses, including the following

1. There is a lack of understanding of the organization of the BOD, OCA staff, and a need for an organizational chart.
2. The financial reporting received from management is inaccurate and insufficient.
3. Oceana has an outdated look.
4. Members of the association don't recognize the interdependence of all of us (the Board, the staff, the residents, and the volunteers).
5. The differences of opinion among homeowners that are separating the community.
6. The apparent lack of kindness and respect towards each other as neighbors.

## **THE PLAN**

**The 2024 Strategic Plan** is presented on the following pages. If you provided input at the June Town Hall/Workshop, you will find your suggestion listed as an action item. The Board heard you! The Board is responding to you! And the Board appreciates your input and support as we move through this board year.

In addition to working on the Strategic Plan action items, a recommendation that the Board is also considering is the formation of a GRANT WRITING COMMITTEE. This committee would help document a procedure for applying for grants to benefit Oceana, research and apply for funding, and help with obtaining a “Letter of Good Standing” from the State Attorney General. As a long-term goal, it is possible that a very successful committee could raise the funding for a grant writer position to help on an ongoing basis.

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**BOARD:** Lisa Bagot (LB), Curt Conant (CC), Kathleen Dowling (KD), Lynn Leszczynski (LL), Teresa-Chamberlain (TCS), Roxanne Rimmel (RR), Evelyn Thomas (ET)

**MANAGEMENT:** Von Yucoubian (VY), Patrick Prendiville (PP), Maintenance (M), Keystone Pacific (KP)

**Board Member of The Month:** (BMOM), **On-Going:** (OG), **Homeowner:** (HO), **Total Landscape Creations:** (TLC), **Community Resource Center:** (CRC), **Unit Advisor Committee:** (UA).

<b>WHO</b>	<b>Improve Communication (All: Board, Staff, Membership)</b>
BOARD, VY	Spread positive perspective, outlook & Attitudes
BOARD, VY	Communicate positively & regularly, Throughout Transition
ET, UA, & VY	Support New Owners/Neighbors Settling In & Become Active
Board, VY	Deliver consistent, positive, accurate messages:
BMOM, VY, RR	Provide timely & consistent board responses to HO inquiries, emails, calls
RR & VY, BMOM	Process to receive & respond to HO input & Suggestions:
Board	Demonstrate Appreciation to Committee Chairs, Volunteers

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<b>WHO</b>	<b>Update &amp; Improve Effectiveness of OCA’s Technology</b>
VY	Coordinate all needs to minimize # IT Programs: SDTek- O&L Drive, FOB, C Update Internet Options
VY	Reduce number of vendors supports needed for technology
CRC, VY	Modify/Update HO Portal: Online Request
VY	Allow Cyber City to bring fiber optics into OCA
VY, RR	On-line registration & payment for activities
VY	On-line reservation for rooms
LL & ET	Develop plan for IT Digital Storage (versus paper)
VY & RR	Reevaluate Cox Communications Contract
KD & The Hub	OCA Website: HUB working on coordinate with no costs: Mapleson Media

<b>WHO</b>	<b>Increase funding resources &amp; reduce financial risk</b>
LL, VY	Work with MGMT to ensure accurate, timely financials
LL, KD, & VY	Project budget needs beyond one year at a time
LL, KP	Clarify presentation of reserve funds
LL, VY , TCS, & KD	Establish grant writing program/guidelines

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<b>WHO</b>	<b>Resolve Current Legal Issues</b>
RR & KD	List & project costs for all legal pending for next year
RR & KD	Get word out for better resident backing/support for litigation
BOARD	Continue Soundness continue legal issues vs. Infrastructure replacement
KD & RR	Plan B: financial actions necessary if lawsuits fail

<b>WHO</b>	<b>Update documentation on policies &amp; procedures</b>
BOARD, VY	Understand & enforce policies & procedures
KD, LL, & ET	Document who does what by when: accountability
KD, LL, & ET	Locate & consolidate approved policies/procedures-10yrs back
KD, LL, & ET	Establish/re-establish needed policies: Tree trimming & EV charging in garage
KD, LL, & ET	Review & evaluate current processes

<b>WHO</b>	<b>Improve effectiveness of association management</b>
BOARD, VY	Hire a general manager
BOARD, VY	MGMT BOD work together a partner not employer/employee
Board, VY	Facilitate smooth transition to new management
Board, VY	Assist HO with smooth transitions
Board, MGMT	Setup boundaries: BOD, KP Staff, & HO
Board & MGMT	Establish regular flow of information between MGMT & Board
MGMT	Facilitate “right sizing” of staff by MGMT
Board & MGMT	Improve response time



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<b>WHO</b>	<b>Support Committees, Chairs, &amp; Volunteers</b>
LL & TCS	Committee & Volunteer Appreciation: Community Stars
BOARD	Volunteer Potluck Quarterly
LL & TCS	Document Committee Best Practices in Action
LL & TCS	Review Committee Structure/Scope with Committee Chairs
LL, KD, & TCS	Do committee standard guidelines: next generation of committee chairs
LL & TCS	Develop orientation for new committee members quarterly
LL & TCS	Committee activities/actions shared with community: Committee showca
CC & ET	Review BOD Procedures & Process

<b>WHO</b>	<b>Care for, repair, &amp; beautify the common area</b>
MD, MGMT	Replace clubhouse door buzzer
KD & TCS	Bring Back Adopt-A-Spot
MD & MGMT	Evaluate and Maintain Building Stucco
MD & MGMT	Identify/fix trip and fall hazards
TCS & LB	Develop a Evacuation/Disaster Plan
MGMT & MD	Improve security: software, dog park, gardens, carports, pool
TLC	Change out timers on irrigation
TLC	Use drought resistant plants/desert landscaping to water usage
TLC	Remove grass replace with shrubs & low maintenance plants
Board	Board & MGMT oversees landscape contract
TLC	Flowers at entrances to A-Z streets